

FIG. 1

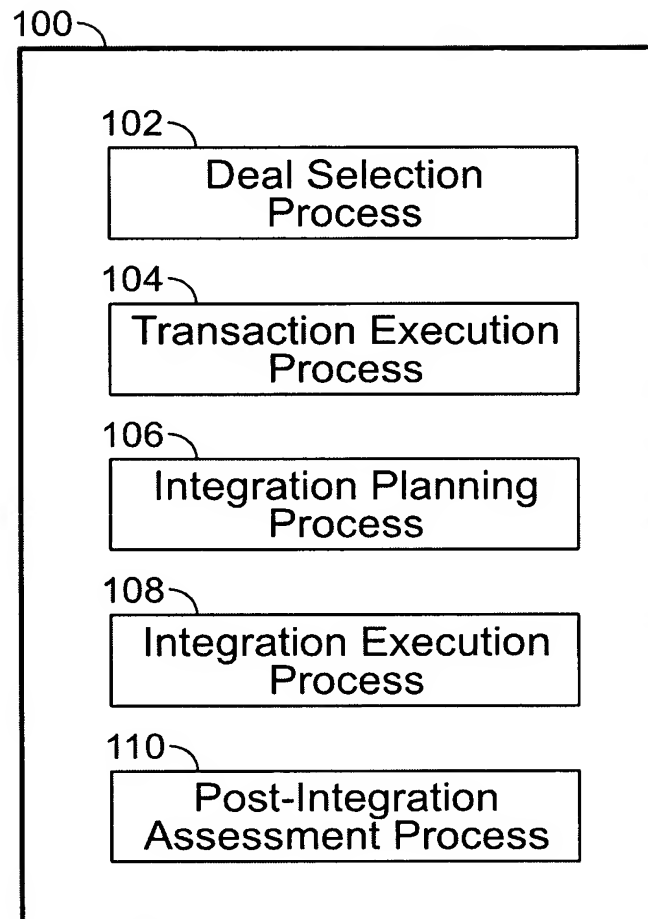


FIG. 2

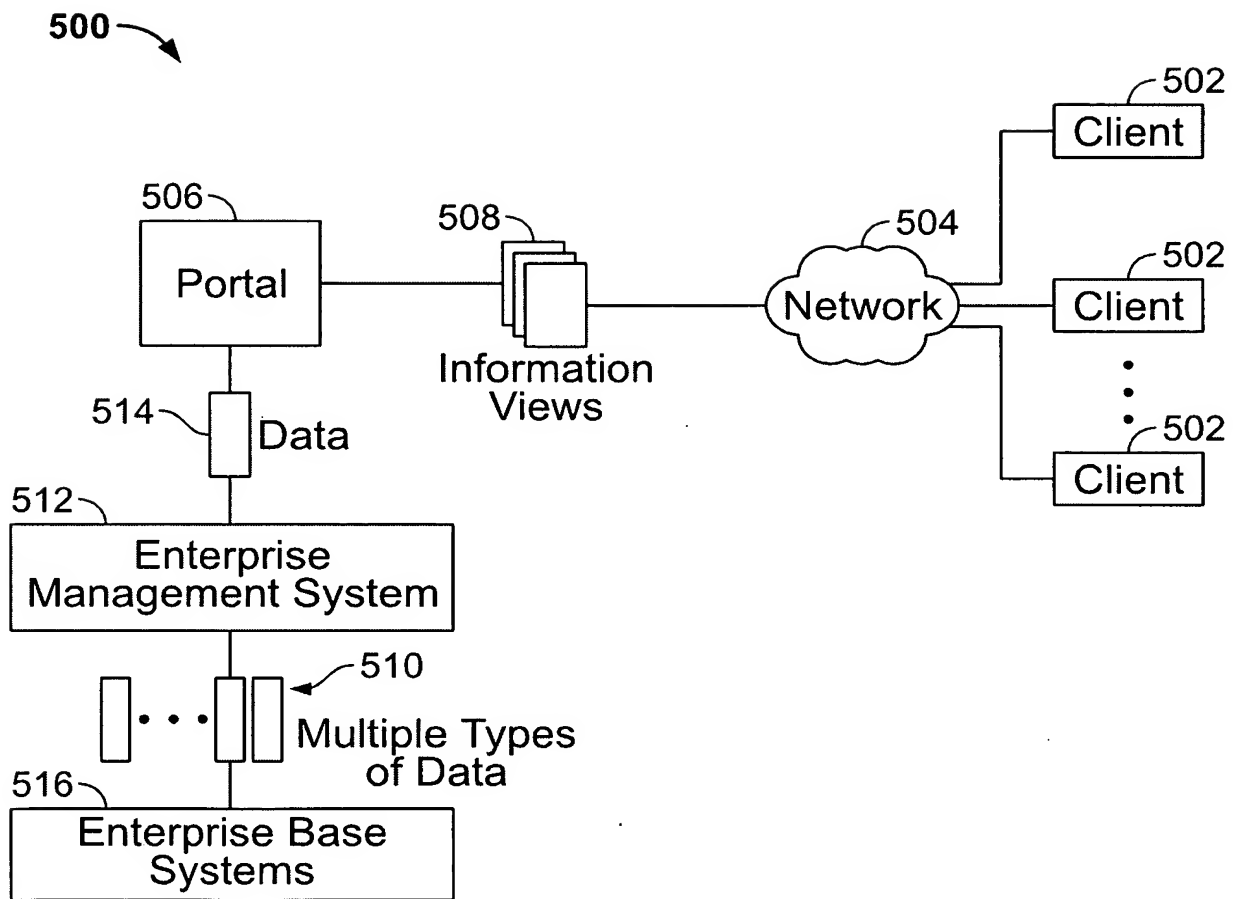
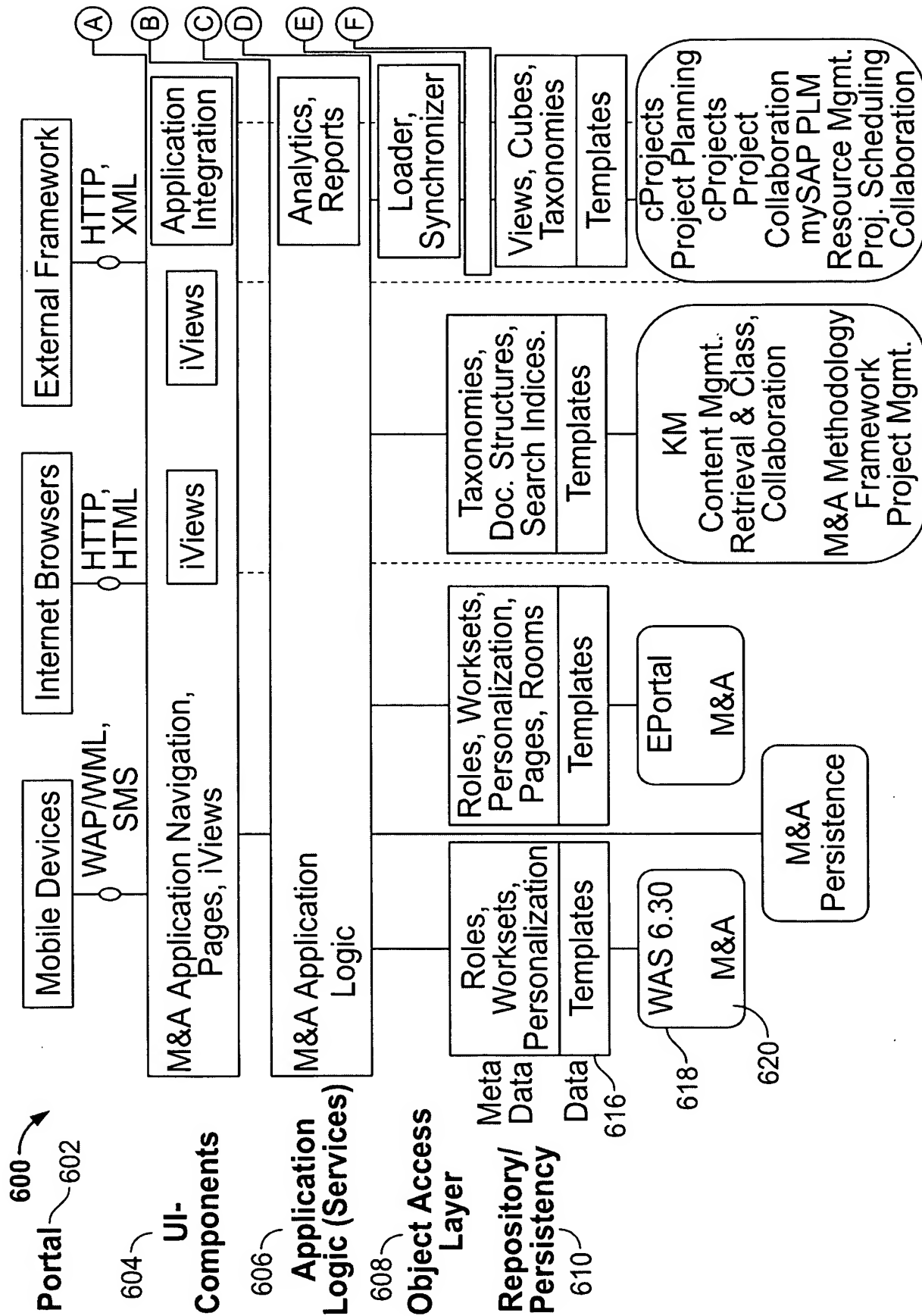


FIG. 3



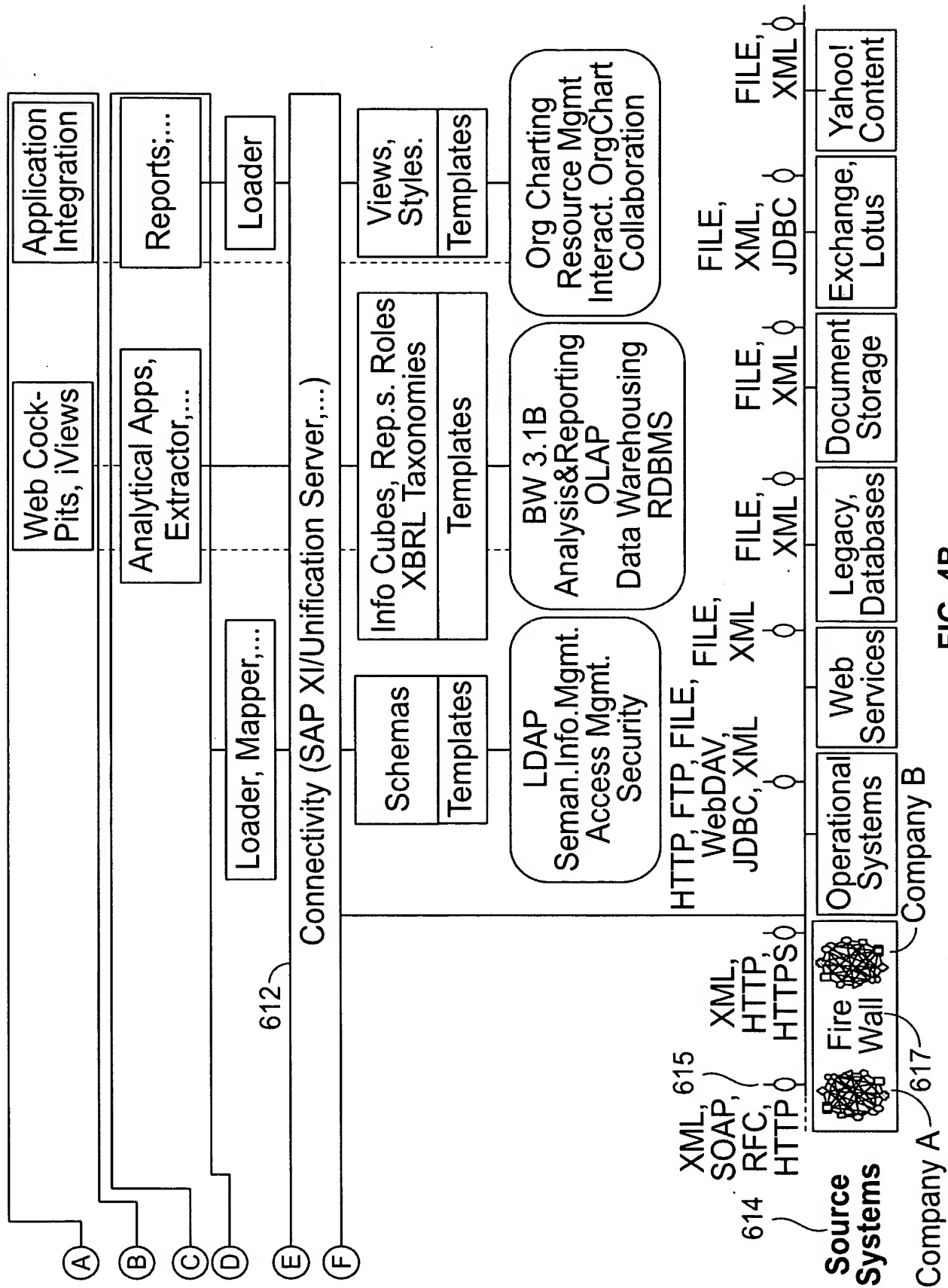


FIG. 4B

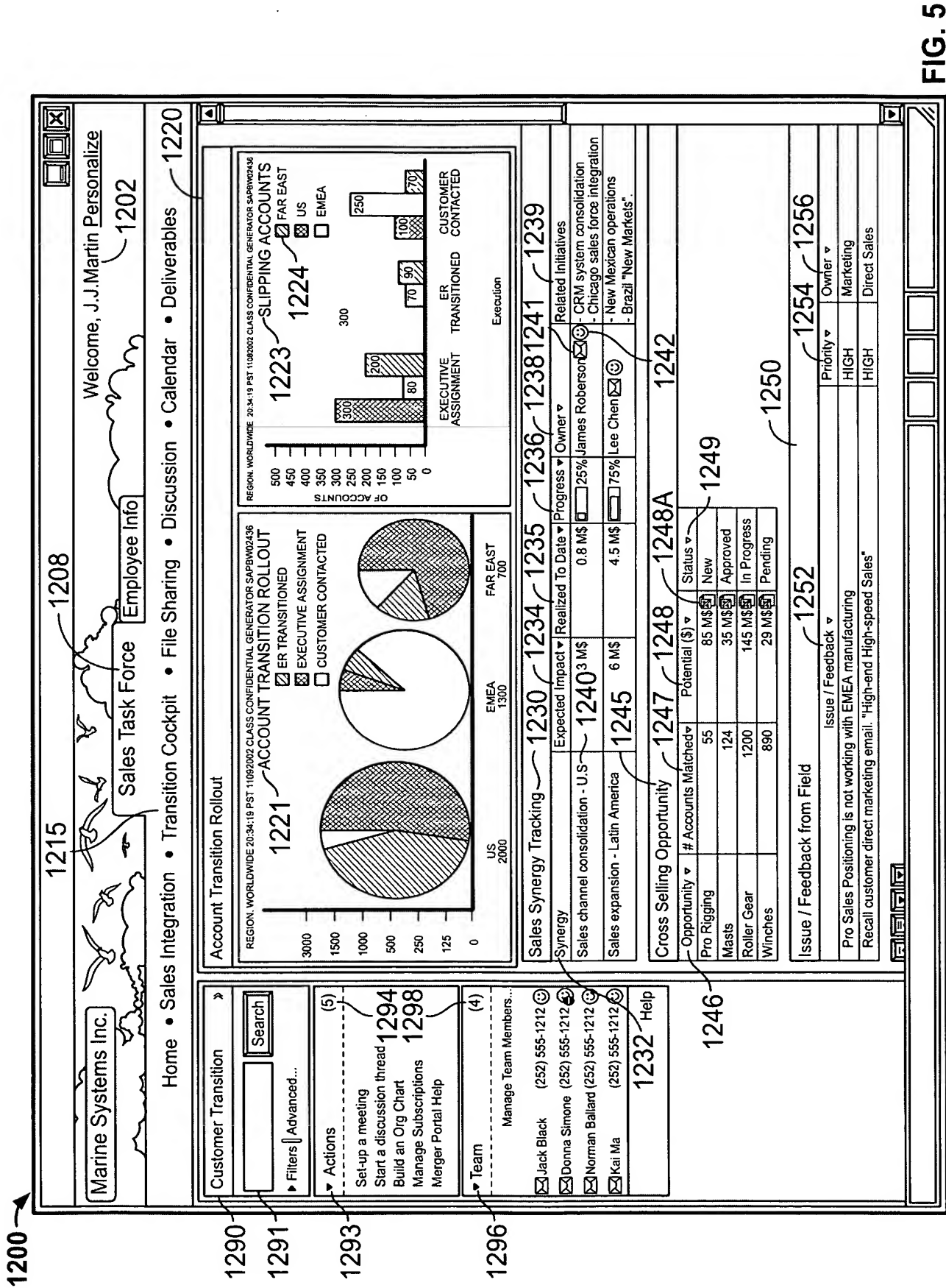
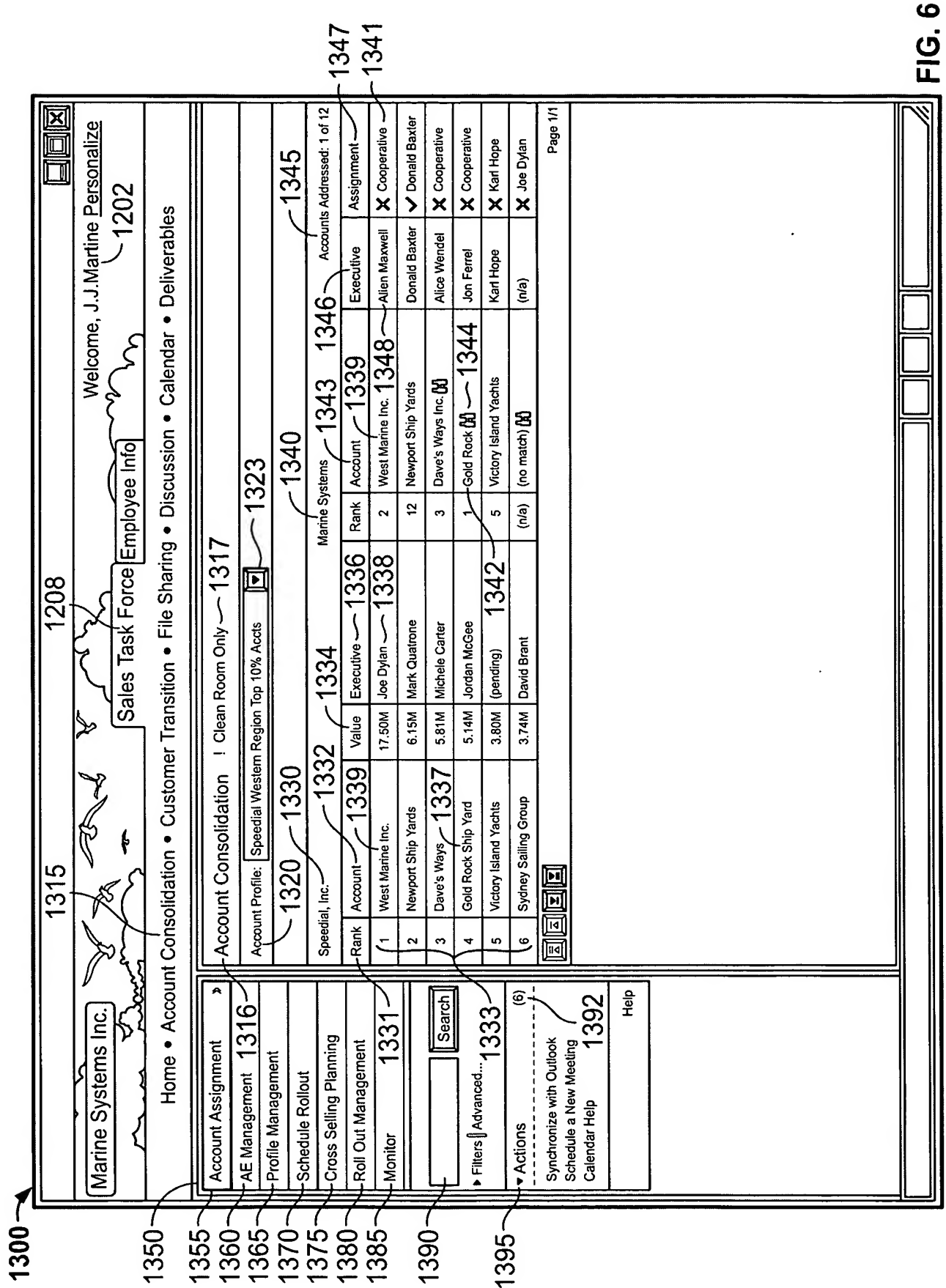


FIG. 5A



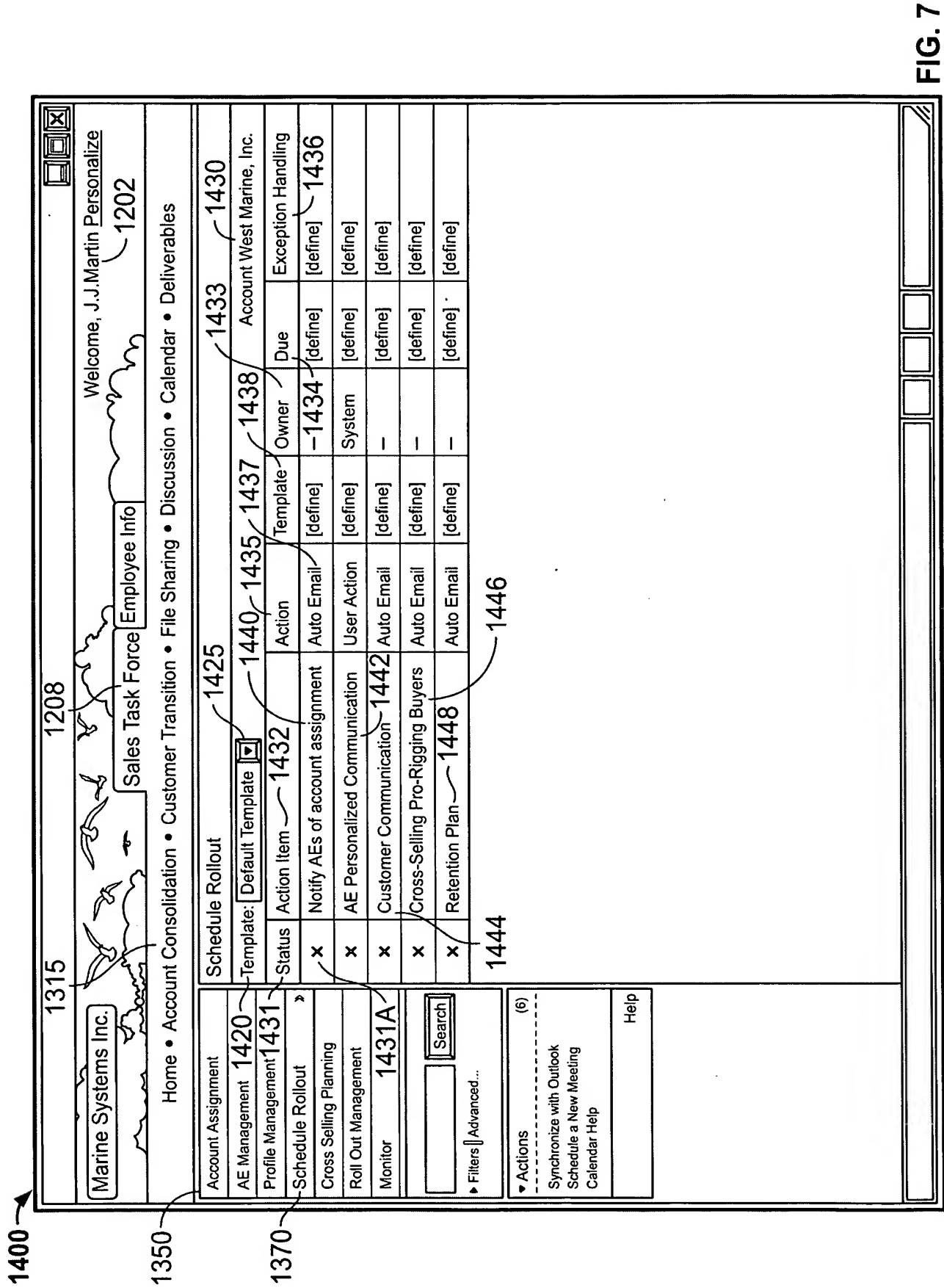


FIG. 7

1500

1420 Schedule Rollout 1425

1431 Template: Default Template 1430 Account West Marine, Inc.

Status	Action Item	Action	Template	Owner	Due	Exception Handling
x	1442 Notify AEs of account assignment	Auto Email	[define]	—	[define]	[define] 1436
x	1444 AE Personalized Communication	User Action	[define]	System	[define]	[define]
x	1446 Customer Communication	Auto Email	[define]	—	[define]	[define]
x	Cross-Selling Pro-Rigging Buyers	Auto Email	[define]	—	[define]	[define]
x	Retention Plan 1448	Auto Email	[define]	—	[define]	[define]

1440 Notify AEs of Account Assignment

1450 Save 1452 Cancel

1445 Notification Template: 1447 Standard Notification 1460

1462 Send to: 1470 Listed AEs

1464 Trigger Date: 1470 Day 1 + 0 days

1466 Response Due: 1470 Day 1 + 3 days

1468 Exceptions: 1472 Alert me via Email 1475

Dear Account Executives,
Due to the acquisition of Marine Systems, we have consolidated client accounts which have counter-parts in both companies. The decision was made based on numerous factors.

FIG. 8

1600

1605 Action Planning: Speedial Western Region Top 10% Accts

1620 Short Assimilation

1622 Add New Action Item Save Reference Model

1631 Status Action Item 1632 1640 Type Template 1635 1637 1638 1633 [due dates estimated based on deal roll-out] Exception Handling

1442	x	Account consolidation & assignment	Auto Email	[define]	1634	Mar. 03, 2003	[define]	1636
1444	x	AE Personalized Communication	User Action	[define]	System	Feb. 18, 2003	[define]	
1646	x	Customer Communication	Communication	[define]	-	Mar. 18, 2003	[define]	
1627	x	Cross-Sell Opportunities	Cross-Sell	[define]	-	Mar. 12, 2003	[define]	
1625	x	Retention Plan	User Action	[define]	-	Mar. 20, 2003	[define]	

1629

1640 Account Consolidation & Assignment

1650 Save Cancel

1647 Notification Template: Standard Notification

1682 Accounts Addressed/Consolidated 1 of 12

1684 Go to Account Consolidation

1662 Send to: Listed AEs

1664 Trigger Date: Day 1 + 0 days

1667 Response Due: Day 1 + 3 days

1668 Exceptions: Alert me via Email

1670

1672

1675

1660 Dear Account Executives.
Due to the acquisition of Marine Systems, we have consolidated client accounts which have counter-parts in both companies. The decision was made based on numerous factors.

FIG. 9

FIG. 10

1700 → Account Consolidation: Speedial Western Region Top 10% Accts ! Clean Room Only ~ 1317

Speedial, Inc. ~ 1330 Marine Systems ~ 1340 Accounts Addressed: 1 of 12

Rank	Account ~ 1332	Value	Executive ~ 1336	Rank	Account ~ 1343	Executive ~ 1346	Assignment ~ 1347
1	West Marine Inc. ~ 1339	17.50M	Joe Dylan ~ 1338	2	West Marine Inc. ~ 1339	Allen Maxwell ~ 1348	X Cooperative ~ 1341
2	Newport Ship Yards	6.15M	Mark Qualtrone	12	Newport Ship Yards	Donald Baxter	✓ Donald Baxter
3	Dave's Ways	5.81M	Michele Carter	3	Dave's Ways Inc. [X]	Alice Wendel	X Cooperative
4	Gold Rock Ship Yard	5.14M	Jordan McGee	1	Gold Rock [X]	Jon Ferrel	X Cooperative
5	Victory Island Yachts	3.80M	(pending)	5	Victory Islands Yachts	Karl Hope	X Karl Hope
6	Sydney Sailing Group	3.74M	David Brant	(n/a)	(no match) [X]	(n/a)	X Joe Dylan

1732 Account 1711 1712

1739 West Marine, Inc. 1713

1710 DUNS: 843.2081.22 Customer Contact: Jones Ferguson [X]

1720 1727 1725 Decision Thread Account Details

1731 Current Assignment: Cooperative

1735 Select an executive as Account Executive [Lead]: You can also Assign Another Executive

1777 1338 1742 1330 ~ Speedial, Inc. 1348 1741 1340 ~ Marine Systems, Inc.

Joe Dylan Assign as Lead 1751 1752 Manager: Hannah Jones [X]

Tenure: 4 years 1746 1779 Manager: Bob Jones [X]

Account Impact on Income: [X] 95% 1781 28%

1745 Total Assigned Accounts: 1762 1764

Account	Value	Assignment
West Marine	17.5M	Cooperative
Boston Whaler	0.42M	Transition
Miami Performance	0.40M	Cooperative
Lido Yachts Sales	0.15M	No Conflict

1755 1760 1757

1772 Comments: Add Comment ~ 1774

This one will be tricky. Joe has relationships with many of our top customers and I don't want to overwork him [Jonathan Frank [X]]

1776 Actually, Joe is actually very good friends with West Marine's CEO. Their families go sailing and they are College Buddies. We need to be balanced [Richard]

1783

Account	Value	Assignment
Atlantic Ship Yards	21.5M	No Conflict
West Marine	8.09M	Cooperative
Steven's Boat Repairs	1.30M	No Conflict

Comments: Add Comment

This is not Allen's main account Plus, he has other more important accounts coming up [Jonathan Frank [X]]

1850-1840-

FIG. 11

